

How *Barbie* Built a Fabulous Insurance Agency with Quotamation

From manual quoting chaos to a fully automated, client-converting machine — one pink blazer at a time.

3 min

QUOTE TIME

100+

CARRIERS

2×

CLOSE RATE

0

PAPER FORMS

MEET THE AGENT

Barbie, *Licensed Insurance Agent*



Barbie Roberts

INDEPENDENT INSURANCE AGENT · MALIBU, CA

Owner of Fabulous Insurance Agency, a boutique independent agency serving homeowners, auto, and lifestyle clients across California. Known for her impeccable client experience and zero-tolerance policy for slow quotes.

Home

Auto

Personal Lines

Independent Agency

Quotamation Partner

Barbie runs a high-volume personal lines agency. Her clients expect the same polish from their insurance experience as they get from everything else in their lives. Fast, beautiful, and on-brand.

Before Quotamation, she was drowning in intake spreadsheets, manual ACORD forms, and quoting portals that looked like they were designed in 2004.

That changed when she discovered Quotamation — and specifically, the new **Custom Forms feature** that lets her build a branded, structured data intake experience that feeds directly into multi-carrier rating across home and auto.

THE PROBLEM

Barbie's Agency Had a *Glam Gap*

Her brand was polished. Her intake process was not. Clients were dropping off before completing quotes, and Barbie was manually re-entering data across five different carrier portals every single day.

⚠ Before Quotamation

- ✗ Generic intake forms with no brand identity
- ✗ Manual data re-entry across every carrier portal
- ✗ No structured home/auto data capture
- ✗ Clients confused by insurance jargon on forms
- ✗ Quotes took 45–90 minutes per household
- ✗ No embeddable quoting link for her website
- ✗ No visibility into which clients completed intake

✦ After Quotamation

- ✓ Fully branded, pink-themed custom form
- ✓ AI-powered Intake — drop a dec page, ID card, or voice memo and it's auto-filled
- ✓ One intake feeds 100+ carriers automatically
- ✓ Structured fields: home specs, auto details, drivers
- ✓ Client-friendly language, prefilled where possible
- ✓ Quotes in under 3 minutes
- ✓ Embeddable widget lives on her Fabulous Insurance Agency site
- ✓ Real-time data — clients rate themselves, she reviews

Barbie's *5-Step* Quote-to-Close Flow

Here's exactly how Barbie uses Quotamation's Custom Forms and multi-carrier rating engine to run her agency like a well-oiled (and very pink) machine.

1

She built her form — her way

Using Quotamation's Custom Forms builder, Barbie created a structured intake form tailored to home and auto. She added her logo, brand colors, and custom field labels that speak her clients' language — "What's your home worth?" instead of "Dwelling replacement cost." She can capture everything from roof type and year built to vehicle VINs and driver history.

✦ CUSTOM FORMS FEATURE

2

She embedded it on her website

With one snippet of code, Barbie's quote form lives directly on her website at FabulousInsurance.com. Clients land on her site, fill out the form — looking like it was built by her team — and the structured data flows instantly into Quotamation. No redirects. No confusion. Her brand, her experience, her link: form.quotamation.com/jafferyinsurance/ahmads-form

✦ EMBEDDABLE WHITE-LABEL FORM

3

The client rates themselves

Barbie's secret weapon: her clients do the work. The form is structured to capture the exact data points carriers need to rate home and auto — year built, construction type, roof material, square footage, prior claims, driver ages, vehicle garaging address. Clients fill it out once. Quotamation does the rest. No follow-up calls to ask "wait, what year was your roof replaced?"

✦ STRUCTURED DATA CAPTURE

4

Quotamation rates across 100+ carriers instantly

The moment a client submits, Quotamation's prefill and rating engine fires across national and regional carriers simultaneously — Progressive, Travelers, Safeco, and dozens more. Barbie gets a ranked quote comparison in real time. No logging into individual portals. No re-entering the same address five times. Just results, fast.

✦ MULTI-CARRIER INSTANT RATING

5

She presents, she closes, she celebrates

Barbie reviews the top options, packages home and auto quotes together for multi-line savings, and presents to the client — often the same day the lead came in. Her close rate doubled. Her average quote time dropped from 75 minutes to under 3. And her clients love that the whole experience feels like "their agent" built it just for them.

✦ MULTI-LINE BUNDLING

Barbie's *4-Step* AI Intake Flow

Before she even gets to rating, Barbie's newest secret weapon is Quotamation's AI-powered Intake — built to turn a blank form into a finished quote in seconds.

1

She starts with the basics

Name, date of birth, and the address to insure — just the essentials to kick off a Home & Auto, Home-only, or Auto-only quote. Everything else can wait.

✦ SMART INTAKE FORM

2

Then she drops her docs

Instead of typing out policy details line by line, Barbie drops a dec page, an ID card, or even a voice memo straight into the intake form — or pastes in notes, an email, or a call summary.

✦ DOCUMENT & VOICE DROP

3

The AI fills in what it already knows

Property details like year built, square footage, construction type, and mortgage status populate instantly — no manual entry required. Every prefilled field is flagged so Barbie always knows what to double-check.

✦ AUTO-PREFILL ENGINE

4

Details pull straight off the page

Vehicle year, make, model, and VIN are read directly from the dropped dec page and matched to the right fields — zero retyping, zero transcription errors.

✦ DOCUMENT-MATCHED FIELDS

The *Embedded Form* Experience

Here's what Barbie's clients see when they visit her website. The form looks native to her brand — but it's fully powered by Quotamation under the hood, capturing structured data and feeding the rating engine in real time.

fabulousinsurance.com/get-a-quote · Powered by Quotamation

Fabulous Insurance Agency

Home Auto Life FA

Get Your Free Quote in Minutes ✦

Fill out the form below and I'll find you the best coverage across 100+ carriers. Fabulous rates, fast.

HOME DETAILS

Property Address

1234 Dream House Dr, Malibu CA

Year Built

2005

Sq. Footage

2,800 sq ft

Roof Type

Asphalt Shingle

AUTO DETAILS

Vehicle

2023 Corvette Convertible

Primary Driver

Barbie Roberts, 29

Prior Claims (3yr)

None

Garaging Zip

90265

Get My Quotes →

Secure quoting powered by Quotamation · 100+ carriers compared instantly

THE RESULTS

Numbers That Are *Totally Fab*

3 min

AVG. QUOTE TIME

2×

CLOSE RATE

100+

CARRIERS RATED

0

MANUAL RE-ENTRIES

24/7

WEBSITE LEAD
CAPTURE

100%

FULLY ON BRAND

"My clients think I have a whole tech team. It's just me, my laptop, and Quotamation. The form looks like I built it from scratch — and quotes come back before I finish my coffee."

— **BARBIE ROBERTS, FABULOUS INSURANCE AGENCY**

FEATURE BREAKDOWN

What Barbie Uses in *Quotamation*

FEATURE	WHAT IT DOES	HOME	AUTO
Custom Forms	Build branded, structured intake forms with your own fields, labels, and logic for home and auto data	✓	✓
AI-Powered Intake	Drop a dec page, ID card, or voice memo — AI reads it and auto-fills the quote	✓	✓
Embeddable Quote Link	Paste one link or snippet onto any website — clients stay on your domain, your brand	✓	✓
Client Self-Rating	Clients fill in structured data that maps directly to carrier rating fields — no re-entry needed	✓	✓
Data Prefill	Auto-populate known data points from third-party sources to reduce client friction	✓	✓
Multi-Carrier Rating	Rate across 100+ national and regional carriers simultaneously from one submission	✓	✓
White-Label Experience	Your logo, your colors, your URL — clients never see Quotamation unless you want them to	✓	✓

Ready to Run Your Agency Like Barbie? ✨

Build your own custom form, embed it on your site, and start rating clients across 100+ carriers — in minutes, not days.

[See a Live Form →](#)

[Learn More](#)